MERANT

COLLABORATION

QUALITY

Edition 2.4

MERANT® TRACKER™ INSTALLATION GUIDE

FROM THE MAKERS OF PVCS®

Merant
3445 NW 211th Terrace
Hillsboro, Oregon 97124 U.S.A.

MA-TRKINST-001

Table of Contents

Welcome to Tracker

Thank you for choosing Merant® Tracker™, a powerful and versatile issue management system.

Purpose of this manual

This manual contains information about installing and configuring Tracker and Notify. Read this manual carefully before starting the installation process.

This manual is intended for use by the Tracker administrator or other user who is responsible for installing and configuring Tracker in your environment. This manual contains both installation instructions and troubleshooting information.

For more information

Refer to the *Merant Tracker User's Guide* for a description of the Tracker documentation set, a summary of the ways to work with Tracker, and instructions for accessing the online help.

Refer to the *Merant Tracker Administrator's Guide* for additional information about configuring Tracker, Tracker project databases, and setting up Notify.

Edition status

This is Edition *2.4* of the *Tracker Installation Guide.* The information in this edition applies to *Release 8.0 of Tracker* or later. This edition supersedes earlier editions of this manual.

Typographical Conventions

The following typographical conventions are used in the online manuals and online help. These typographical conventions are used to assist you when you use the documentation; they are not meant to contradict or change any standard use of typographical conventions in the various product components or the host operating system.

Convention	Explanation
italics	Introduces new terms that you may not be familiar with and occasionally indicates emphasis.
bold	Emphasizes important information and field names.
UPPERCASE	Indicates keys or key combinations that you can use. For example, press the ENTER key.
`monospace`	Indicates syntax examples, values that you specify, or results that you receive.
`monospaced italics`	Indicates names that are placeholders for values you specify; for example, *`filename`*.
`monospace bold`	Indicates the results of an executed command.
vertical rule |	Separates menus and their associated commands. For example, select File | Copy means to select Copy from the File menu. Also, indicates mutually exclusive choices in a command syntax line.
brackets []	Indicates optional items. For example, in the following statement: `SELECT [DISTINCT]`, DISTINCT is an optional keyword.
. . .	Indicates command arguments that can have more than one value.

Ordering Hard-Copy Manuals

As part of your Tracker license agreement, you may print and distribute as many copies of the Tracker manuals as needed.

If you do not want to print each of these online manuals, you can order hard-copy versions from Merant. To order, please contact your sales representative for assistance.

Contacting Technical Support

Merant provides technical support for all registered users of this product, including limited installation support for the first 30 days. If you need support after that time, contact us using one of the methods below or purchase further support by enrolling in the SupportNet program. For more information about SupportNet, contact your sales representative.

Technical support is available 24 hours a day, 7 days a week, with language-specific support available during local business hours. For all other hours, technical support is provided in English.

WWW	SupportNet Customers can report problems and ask questions on the SupportNet web page: http://support.merant.com/ To submit an issue, click the **Report a Problem** link and follow the instructions. The SupportNet Web site contains up-to-date technical support information, which you can access from the SupportNet web page. Our SupportNet Community shares information via the web, automatic e-mail notification, newsgroups, and regional user groups. SupportNet Online is our global service network that provides access to valuable tools and information for an online community for users. SupportNet Online also includes a KnowledgeBase, which contains how-to information and allows you to search on keywords for technical bulletins. You can also download fix releases for your Merant products.	
E-mail	support@merant.com	
Telephone	Asia Pacific	+61 3 9522 4455
	Australia	1800 335 664
	Österreich	0800 292 783
	Belgique (Langue Française)	0800 774 79
	France	0800 915 607
	Deutschland	0800 1822 496
	Hong Kong	800 900 521
	Italia	800 791 179
	Japan	0120 749090 or 00531 790014 (in Japan only)
	Nederland	0800 022 1609
	New Zealand	0800 444 515
	Singapore	800 4481 230
	South Africa	0800 99 1115

	South Korea (Korean)	003 0844 0044
	España	900 968 929
	Suisse (Langue Française)	0800 836 736
	Schweiz (Deutschsprachig)	0800 836 737
	United Kingdom and Ireland	0808 100 2672
	USA, Canada, and Mexico	1 800 443 1601
All countries, for support in the following languages between 09.00 and 18.00 CET (Central European Time)	English Speaking	+44 1727 811 122
	Langue Française	+44 1727 811 289
	Deutschsprachig	+44 1727 811 312
	Idioma Italiano	+44 1727 811 136
	Habla Español	+44 1727 811 134
Fax	Asia Pacific, Australia, and New Zealand	+61 3 9522 4477
	Europe, Middle East, and South Africa	+44 1727 812 665 or +44 1727 869 804
	Japan	+81 3 5456 5434
	U.S.	1 503 645 6260
Mail	3445 NW 211th Terrace, Hillsboro, OR 97124 USA	

When you contact us, include the following information:

- The **product serial number** located on the Product Registration Information card in the box. The number will be checked to verify your eligibility to receive support. If you do not have a current SupportNet contract, we will ask that you speak with a sales representative.

- Your **name and organization**. On a first-time call, you may be asked for full customer information including location and contact details.
- The **version and build number** of the Merant product you are using.
- The type and version of the **operating system** you are using.
- Any **third-party software and other environmental information** necessary to understand the problem.
- A **brief description of the problem and the steps necessary to re-create** it. Specific error messages are needed. Depending on the complexity of the problem, you may be asked to submit a re-creatable example demonstrating the problem.
- An assessment of the **severity level** of the reported problem.

1 Before You Install

In this Chapter

Process Checklist

Before you install Tracker, perform the following steps:

☐	Understand the installation options [page 14]
☐	Review the system and database requirements [page 16]
☐	Understand when to set up licensing and the license server [page 16]
☐	Review the additional configuration steps [page 17]
☐	Install the DBMS client software if you are not evaluating Tracker [page 18]

Installation Options

Overview

Tracker is a multi-user application designed for use on the LAN, intranet or Internet. Depending on your environment, it is possible to install copies of Tracker on one or more file servers, user workstations, and web server systems.

Each Tracker user must be able to run Tracker from the local system, run a shared copy of Tracker from the network, or access the Tracker web client component via a supported web browser.

Installation types

Tracker offers three types of installation to help you set up and configure the application according to your needs. These installation types are listed below:

Install Type	Description	Reference
Local	Install Tracker components on the local drive of a user system.	Chapter 3, "Installing Tracker on a Local Workstation," on page 43.
Network	Install Tracker components to a location on a network. Users choose to run the shared copy of Tracker, or copy Tracker files to a local drive.	Chapter 4, "Installing Tracker on a Network," on page 51.
Web Server	Install Tracker (including web client component) on the local drive of a web server system.	Chapter 5, "Installing Tracker on a Web Server," on page 61.

Mixing installation types

You can mix installation types among users in any way that suits your environment, as long as all users can connect to a Tracker project database.

For example, it is possible for some users to run shared copies of Tracker from one or more file servers while others run the application from a local drive. Still others may access Tracker projects via the web.

For information on setting up a Tracker project database and connecting users, see the *Merant Tracker Administrator's Guide.*

System Requirements

Tracker is supported on Windows operating systems. The Tracker web interface is also supported on UNIX through a browser.

For specific supported platform, version information, and disk space requirements, refer to the readme file.

NOTE Version 4.01 or greater of Microsoft Internet Explorer is required for the Tracker LAN client (to support HTML forms). It is not required to use Internet Explorer, but Internet Explorer must be present.

Database Requirements

Tracker requires that you use a database management system (DBMS) to store Tracker data. Note that the Learning Project works with an MSDE file system. This DBMS is for evaluation of the product only. For greater performance, security, and data integrity, use Tracker with the supported versions of the Oracle, SQL Server, and Sybase databases. For information on Merant's recommended versions, refer the readme file.

NOTE You need to set your TEMP variable on your operating system to a location that has a minimum of 16 MB space available when installing Tracker.

Licensing Tracker

Before you can log into the Tracker projects or the Learning Projects, you must have valid licenses set up on the license server.

Refer to "The Licensing Process" on page 25 to see how to set up your license server and get licenses for your users.

Additional Configuration Steps

Overview

Tracker allows you to perform additional configuration steps after you install. These steps allow you to exercise greater control over the installation process, or over operations of the Tracker application.

If you are performing a network install, you can complete some of the installation steps before users set up workstations. The steps you complete will affect Tracker configurations for individual users. For more information, see "Preconfiguring Tracker for Network Users" on page 55.

Optional configuration steps

The following table lists the optional configuration steps:

Step	Description	Reference
Preparing a silent workstation setup	Prepare a workstation setup to pre-define setup options for users (network install only).	"Editing PVCSTRK.INI" on page 76.
Edit PVCSTRK.INI	Manually configure Tracker program settings.	"Editing PVCSTRK.INI" on page 76.
Configure ODBC data sources manually	Set up data sources that use Merant or other ODBC drivers.	"Configuring ODBC Data Sources" on page 82.

Installing DBMS Client Software

Overview

Tracker allows you to use either Sybase, Oracle, or SQL Server database management systems (DBMSs) to store Tracker project data.

If you plan to use Tracker with Microsoft SQL Server, the Microsoft Data Access Component (MDAC) is installed during the Tracker installation process. If you choose not to use MDAC, you can deselect the component during the install.

NOTE DBMS client software is not required on systems where users access Tracker projects via the web only.

DBMS for the Learning Project

For evaluation purposes, Tracker installs the MSDE (Microsoft SQL Server Desktop Engine) for use with the Learning Projects. This component is selected by default in the install. If you don't want the MSDE installed, deselect the component during the install.

DBMS client software by database

The following table lists the DBMS client software you must install for each supported database:

Database	Driver	Client software
Microsoft SQL Server	Tracker 4.2 SQL Server	None
Sybase	Tracker 4.2 Sybase ASE	None
Oracle	Tracker 4.2 Oracle 8	Oracle SQL*Net
Oracle	Tracker 4.2 Oracle Wire	None

NOTE Even though the Tracker 4.2 Oracle 8 driver source name has "8" in the name, you can use 8 or 9 with the data source. When the new drivers are installed, Tracker overwrites the datasource servers automatically and will use the new datasource with the same description.

Install the database client software using the instructions that came with your DBMS (Database Management System). This step should be performed by your DBA or another user who is knowledgeable about the database and how it is implemented in your environment.

Other sources of information

For additional information on setting up client software for use with Tracker, see "Troubleshooting Database Connections" on page 87.

If you need additional support in installing or configuring the appropriate client software for your DBMS, contact the technical support services offered by your database vendor.

Upgrading Your Projects after Install

When installing the latest version of Tracker, use the section "Upgrading Projects" in the *Merant Tracker Administrator's Guide* for instruction. You will find procedures and process guidelines on what to do with your projects to best suit your environment.

2 Licensing Tracker with Merant License Manager

In this Chapter

Process Checklist

To set up licensing for Tracker, perform the following steps:

- [ ] Familiarize yourself with the license server and licensing process [page 23]
- [ ] Install the License Manager tool [page 27]
- [ ] Get licenses [page 28]
- [ ] Start the License Server [page 33]
- [ ] Named License model only: Set up named users in the License Manager with valid Tracker user IDs [page 35]
- [ ] Set up notification for licensing issues [page 36]
- [ ] Install Tracker

Tasks to Manage the Licenses After Install

Common tasks that help you set up and manage your licenses and license server are documented here:

- [ ] Add licenses to your license pool [page 33]
- [ ] Start or stop the license server [page 33]
- [ ] Find out what licenses you have [page 38]
- [ ] Change license servers [page 39]

Using the License Server

The Merant License Server gives you the ability to centralize your license management across multiple development environments. The licensing tools can help you keep track of active licenses and versions of the software in use.

When you know what licenses are in use, you can manage costs by determining what license types are appropriate for your company's needs. You can use this tool to see if all the licenses are in use or track down who is using what version and license.

Difference Between License Server and License Manager

The license server is what you use to host the licenses you've purchased. You install the Merant License Manager on the license server to obtain and manage licenses and set up notification if something goes wrong on the license server.

The product features that you choose to license all need to have access to the license server when you install them. During product installations, you will be prompted for the license server machine name or IP address so the product or features within the product will be properly licensed.

There is minimal CPU usage required on the server to run the license server utilities.

Understanding the Different Licensing Models

When licensing Tracker features for your organization, you can choose to license Tracker with named and/or concurrent licenses.

To give you an understanding of the different licensing models, you can think of the license models as tables in a restaurant. The named license is a reserved table. The concurrent model is an empty table ready on a "first come first serve" basis.

Named Licenses

Named licensing reserves the licenses based on user names entered on the machine hosting the license server. You can manage the users from the Products tab in the Merant License Manager tool. Only users who have been named in the tool can log in to Tracker. The Administrator can name as many users as there are licenses.

Concurrent Licenses

Concurrent licensing, or floating licenses, allows you to purchase a number of licenses that can be used by any user. If you are in an organization spread across multiple time zones or have users who infrequently use Tracker, concurrent licensing may work better than named licenses because multiple people can share the same license.

If a user is logged in to Tracker and is idle for half an hour, the license gets checked back in to the license server. You can configure this to extend beyond the half hour time limit. See "Configuring the License Time-Out for the Web Client" on page 38 for more information.

Using the Two Models Together

You may have an environment in which some users use Tracker some of the time and other users use it exclusively throughout the day. You can purchase both types of license models to accommodate both usage types.

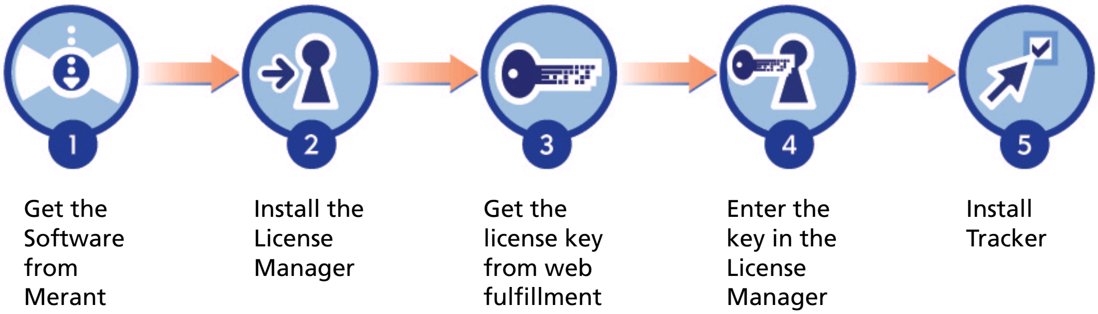
Licensing Users in Different Locations

If you are licensing users in different locations and you have relatively slow networks, you may want to install a License Manager and set up the users in each location on the local license server machine. When you do, you need to install the License Manager in each location to set up the license server. If you have faster networks, you can install the license server on one central network machine and have all Tracker users point to it.

The Licensing Process

To use licenses appropriate for your organization, you need to have an understanding of your Tracker users, which interfaces they use, and how often they use Tracker. Once you've gathered this data, you can choose a licensing model that best suits your organization.

There are different ways to implement the license models so you should create a plan for purchasing and rolling out the licenses that best suits your organization.



Step	Action
Select licenses for your users	Select the number and type of licenses to use in your organization.
Purchase the license	Contact your sales representative to purchase the licenses for your users.
Install the license server	Install the license server on a machine accessible from Tracker users' machines. If you want to use the licenses in different locations, install the License Manager software at each location where the licenses are required.
Get the licenses	Launch the License Manager and use the web fulfillment system to get a license key with the amount and type purchased.
Start the license server	Start the license server to activate the licensing.
Install Tracker	Install Tracker and enter the hostname or IP address of the license server machine.

Installing the License Manager

Install the Merant License Manager on a server that you will use as the license server for the Merant products. The License Manager installation sets up the features required to run the License Manager on the license server.

NOTE You don't need to install Tracker on the license server. When you install Tracker, you will be prompted for the license server location.

Installing the License Manager on Windows

To install the License Manager:

1. Insert the Merant Professional Series CD in the appropriate drive and exit any applications. You may also download the Merant License Server application from the Merant website.
2. Launch the following program:

   <Drive>:\Merant License Manager\win32\setup.exe
3. Follow the on-screen prompts to complete the installation.

Installing the License Manager on UNIX

To install on UNIX:

1. Insert the Merant Professional CD in the appropriate drive and exit any applications. Depending on how your workstation is configured, your CD-ROM drive may be mounted automatically. If the CD-ROM drive is not mounted,

you must mount it before continuing. See the CD cover for information on how to mount the CD-ROM.

2 Navigate to the Setup program by entering:
`cd <cd_root>/licensemanager/unix`

3 Run the setup program by entering:
`./lminst`

4 Enter a location to install the program and follow the prompts to complete the installation.

After You Install

After you install the Merant License Manager you need to:

- Get licenses for your users. See "Getting Licenses" on page 29.
- Add user IDs for the named licenses that match valid user IDs in Tracker. See "Managing User Names for Named Licenses" on page 35.
- Start the license server if it did not automatically start. See "Starting the License Server" on page 33.
- Install Tracker.
- Set up notification for licensing errors. See "Setting up Notification for Licensing Issues" on page 36.

Licensing the Product

The License Manager automates the process of getting licenses from Merant.

Open the License Manager tool by selecting
Start | Program Files | Merant License Server | License Manager.

Open it on UNIX by navigating to where you installed it.

Getting Licenses

To get licenses, use the License Manager tool to access Merant's web fulfillment system.

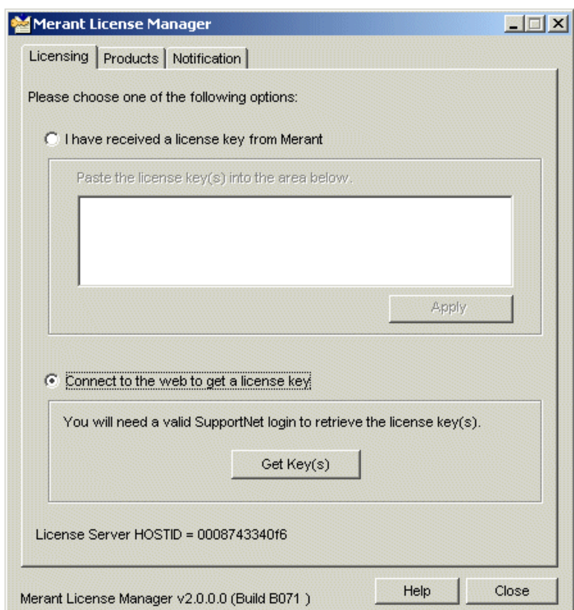
With web access from the license server

To get a license from Merant using the License Manager tool:

If you already have a license key from Merant, you can paste the key string in the field available in the License Manager tool.

If you don't already have a license key, you need to:

1 Select the **Connect to the web to get a license key** option on the Licensing tab and click the Get Key(s) button.



2 The Merant SupportNet web page appears. To obtain the key from the web fulfillment:

a Enter your SupportNet account user name and password to log in. If you don't have a SupportNet account, you will need to register for one using the product's serial number. If you don't have a valid serial number, contact your Merant sales representative.

b On the Select Product page, choose the product to license from the **Product** list and click Continue.

c On the Verify Entitlement page, your serial number and host ID are entered in the form automatically. Click Continue if you don't need to change any of the information.

NOTE If the machine you are using to access the web is not the license server, you need to enter the host id for the license server in the space provided. You can get the license server host id by entering `lmutil lmhostid` from a command prompt in the Merant License Manager directory.

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d On the Request Key page, select how many seats you would like to license. Enter the number of seats in the space provided.

e On the Confirm Request page, you can choose whether or not to use the 30 day grace key which you can use to help you ease into the licensing process. This key will give you a percentage more licenses than you purchased to ensure that you have enough to get Merant products installed and your users started.

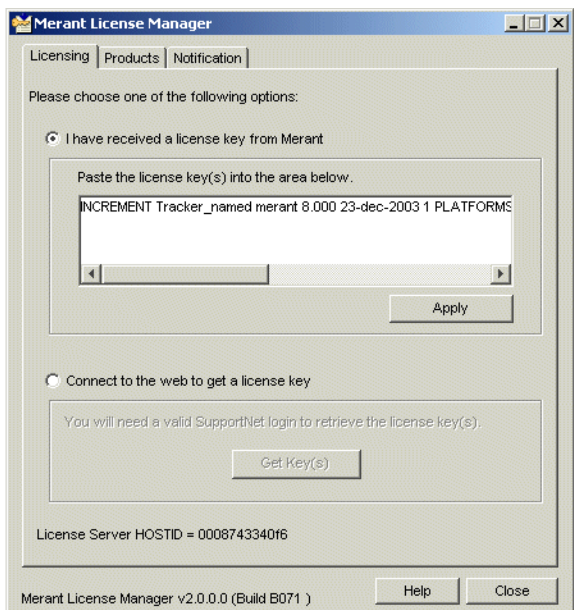
- Choose **Yes** to use the grace key for 30 days. After 30 days, you will need to make sure that you have enough licenses for your number of users.
- Choose **No** to continue without the grace key. Choosing No means you will get as many licenses as you

purchased and will need to set up the license server for your users before installing the Merant Professional products.

f On the Generate Key page, copy the entire license string from the shaded area on the page, including the section in quotes.

3 Return to the License Manager tool and select the **I have received a license key from Merant** option and paste the key in the field available.

NOTE Make sure that you don't copy any extra spaces or the License Manager will consider the key invalid.



key string copied and pasted in

4 Click Apply. Merant will e-mail you a copy of your license key to keep for your records.

5 If you are using named licenses, you need to add at least one valid user ID into the license server or set the license server to add user names in automatically before you can log into

Tracker. See “Managing User Names for Named Licenses” on page 35.

The license server will start automatically. If it does not, you can start it manually. See “Starting the License Server” on page 33 for more information.

With no web access from the license server

To get a license from Merant if your server doesn’t have web access:

1 From a different computer with web access, connect to the SupportNet web site. Make sure you know the serial number, and host ID of the license server machine, and the number of seats you want to acquire so you can enter it in the web fulfillment system.

   You can find your license server machine’s host ID at the bottom of the Licensing tab of the License Manager dialog box.

2 When you access the web page with your key string, copy that key string into a text editor and copy that file to a floppy or a location on the network accessible from the license server machine.

3 Insert the floppy in the server or navigate to where the file is stored on the network. Open the file and copy the key string and paste it in the field available on the License Manager tool.

With no web access at all

To get a license from Merant if you don’t have web access at all:

Contact Merant Answerline for assistance if you cannot use the web to obtain a license. See “Contacting Technical Support” on page 9.

Adding Licenses

If all of your licenses are not already in use, you can add license keys for seats you have already purchased through the License Manager tool.

If you run out of purchased license seats to use, contact your sales representative at Merant to purchase additional licenses to add to your serial number.

To add license keys from your initial purchase:

1 Follow steps listed above in "To get a license from Merant using the License Manager tool:" on page 29.

2 Click Apply to restart the license server.

To buy more licenses and add them to your pool of licenses:

Contact your Merant sales representative to purchase additional licenses. Once you have your serial number updated for additional seats, follow the instructions above to obtain additional licenses.

Starting the License Server

If the license server did not start automatically after you have obtained the licenses, start the license server before installing other Merant products.

On Windows

To start the license server on Windows:

Go to Start | Programs | Merant License Server | Start License Server.

To stop the license server on Windows

Go to Start | Programs | Merant License Server | Stop License Server.

On UNIX

To start the license server on UNIX:

At a command prompt, run:

```
/usr/merant/license_manager/<os>/start_license_server
```

To stop the license server:

At a command prompt, run:

```
/usr/merant/license_manager/<os>/stop_license_server
```

Running the License Server as a Service

You may want to run the license server as a service. When the license server runs as a service, the license server restarts automatically when you reboot the machine.

To run the license server as a service:

On Windows

1 Go to the directory where you installed the Merant License Manager and double click to open `lmtools.exe`.

2 Click the Config Services tab and select the **Use Services** check box. If you want the service to be automatic, select the **Start Server at Power Up** check box.

On UNIX

If you are using the license server on UNIX, refer to the *License Server User's Guide* located in the directory where you installed the License Manager. This document will guide you through the commands necessary for checking the server status and running it as a service.

After Setting Up the Licenses

Without Tracker Installed

After getting licenses, you can install Tracker or any other Merant product. If you are using the named licensing model, the license manager is set by default to assign licenses to users automatically when they log into Tracker. If you don't want user IDs to be added automatically to the license server, see "Managing User Names for Named Licenses" on page 35.

If you prefer to roll out Tracker to users using the workstation installation, you can pre-configure the license server information when you set up the workstation installation. This eliminates the need for users to know the IP address of the license server machine during installation or when logging in.

Otherwise you need to let your users know the name of the license server or the IP address so they can successfully complete their Tracker installations.

With Tracker Installed

If you have already installed Tracker or any other Merant product, then you can enter the location of the license server in the prompt when you first start the product.

Managing User Names for Named Licenses

If you've purchased named user licenses, you need to enter the Tracker user IDs and the features they are allowed to use in the License Manager before users can log into Tracker projects, including the Learning Projects. You can enter their names in manually or set the License Manager to assign licenses automatically.

To assign, reassign, or delete users from features:

1. On the Products tab, select the feature from the **Product Licenses** list and click the Manage Users button.
2. The User Management dialog box opens. Select the user from the **Licensed** list and click:
   - **Add User** to add a user(s) to the feature by typing in the user ID. You can add as many users as you like, by separating the IDs with a space.
   - **Remove User** to remove the user(s) from the list.

To automatically assign named licenses to users who request them:

- On the Products tab, select the feature from the **Product Licenses** list and select **Auto-add user IDs for named licenses** to automatically add users' IDs to a named license list when users log into Tracker. This option is set by default.

  When users to log in to a product, the server will check to see if there are licenses available for the feature they are attempting to use. If there is a license available, the server will write the user ID in the users list and assign a named license to the user for that feature.

Setting up Notification for Licensing Issues

The Notification tab gives you the ability to set up notification from the license server. You need to supply the license server your SMTP server address and e-mail address to be notified of licensing issues by e-mail. You need to set up notification on only one workstation that has access to the e-mail server.

You can be notified of conditions such as when:

- You are out of licenses
- Users are requesting licenses that are not on the server
- Users are denied a license because they are not on the named list

To set up notification of licensing errors:

1. Specify your e-mail server and address:
   - Enter your license server SMTP Server IP/Hostname and your e-mail address.
   - Click **Send email notification of licensing issues** to enable notification. If you want to put your notifications on hold, deselect it.
2. Click Apply Changes.

Managing Your Licenses and the License Server

After you have installed the License Manager tool and obtained a license key for your users, you can use a combination of the Merant License Manager and licensing utilities to manage the server and licenses.

Setting Up Licenses For Workstation Installation

To set up licensing for workstation installation images, update the CONNECT.INI or the PVCSTRK.INI file to include the hostname and IP address of the license server in the installation image. See “Preconfiguring Tracker for Network Users” on page 55 for more information.

Finding Out What Licenses You Have

Named Licenses If you are using named licenses, you can select the named license and click the Manage User IDs button from the Products tab to see how many licenses you have available and how many you have yet to use.

Concurrent Licenses If you are using concurrent licenses, you can check the license usage by clicking the Concurrent Usage button on the Products tab.

Concurrent Licenses on UNIX If you are using concurrent licenses you need to check in the log file from the command line. Refer to the *License Server User's Guide* for instructions on how to get an activity log.

Configuring the License Time-Out for the Web Client

When concurrent license users are idle on the web client for more than 30 minutes, the license is checked back in to the license server. If you wish to extend that license time-out to longer than 30 minutes, you can configure it by setting the minutes in the PVCSTRK.INI file under LICENSE_TIMEOUT. Any time less than 30 minutes is ignored and you must use minutes as the time value.

Moving the License Server

If you need to move the license server to a new machine contact Merant Answerline for assistance. See “Contacting Technical Support” on page 9.

Changing License Servers

If you need to switch license servers after users have successfully logged in to Tracker, you must edit the CONNECT.INI file to make the change. If you are not using the CONNECT.INI file, edit the local PVCSTRK.INI file. It is not possible to change the server through the Tracker desktop or web clients.

In the PVCSTRK.INI file, navigate to the following area:

[License Server]
host=@<host name>

Change the location to the correct license server and restart Tracker. If you are using the Tracker web client, you need to restart your web server. Users will be able to use Tracker by pointing to the correct license server.

Using the Licenses with Tracker

Licensing Tracker anonymous submit

If you use the Anonymous submit feature in the Tracker web client, you can assign one of your licenses as the anonymous submit user.

If you use named licenses, the anonymous user uses the named license. If you have several users logging in as the anonymous user, they will each use that one named license.

If you use concurrent licenses, the Tracker web server will require one license. When anonymous users submit issues, they will consume the license, but only one user can submit at a time. After the anonymous user is done submitting the issues and logs out of Tracker, the license will return to the server for the next user.

When a user's system crashes suddenly	If a user's machine crashes unexpectedly the license will remain checked out for a half an hour. The user will have up to a half an hour to log back in to Tracker before the license returns to the server.
When a user logs in to several machines	If users are logged in to more than one machine and they are using concurrent licensing, each machine they are logged in to consumes a license. If users are logged in to more than one machine with a named license, they need a named license for every machine they are logged in to.
How long before the concurrent license times out on the Tracker web client?	If you are using concurrent licensing on the Tracker web client, the licenses will time-out after a half an hour of idle usage. After the half hour, if the user wishes to continue working on Tracker, a new license will be checked out for the user.

Upgrading Your Evaluation License

If you installed Tracker and used an evaluation license, it is good for thirty days. After that period, you need to take some steps to upgrade the evaluation license to a permanent license.

To upgrade to a permanent license:

1. Set up your license server and get a permanent license key. See "Licensing the Product" on page 28.
2. For each licensed machine, edit the PVCSTRK.INI file by entering the following:

```
[Licensing]
SERVER=@<name of license server>
```

where `<name of license server>` is the name of the license server you set up.

3 Installing Tracker on a Local Workstation

In this Chapter

Process Checklist

To install Tracker on a local workstation, perform the following steps:

- [ ] Ensure the license server is running [page 33]
- [ ] Install Tracker on a local workstation [page 45]]
- [ ] Notify Service only: Install the Notify service [page 47]
- [ ] Set up the Learning Project [page 47]

Overview

Install Tracker on a local drive

A local installation of Tracker consists of application features installed on a user's workstation. A copy of Tracker installed locally is not accessible to other computers on the network.

This type of installation is best for environments where users are responsible for installing, maintaining, or upgrading software on their own systems, or where network performance is an issue.

Installing Tracker locally may require you first to install DBMS client software, if required, and then to run the Tracker Setup program. See "Database Requirements" on page 16 for more information.

Where to find the Notify component

Tracker and Notify are installed from the same installation. Notify is a component of the Tracker install. You can install it with Tracker or by itself on a separate workstation.

Installing Tracker Locally

Run the Setup program

Usually, you will use the autorun facility on the CD-ROM to install Tracker. In certain instances, autorun may not be available. To install Tracker features without using autorun, run the Setup program from CD-ROM and follow the on-screen prompts.

Features installed by default

Setup installs the features required to run Tracker locally and does not overwrite the Learning Project if you have it already installed. You can choose to install features alone without installing Tracker.

The following features are selected by default in the Select Features dialog box:

- Tracker Learning Projects with MSDE
  (appears only if you do not already have an instance of the MSDE named Tracker from a previous installation)
- Tracker Desktop Client
- Tracker Admin
- TrackerLink
- Tracker Toolkit (TTK)
- Metrics
- Tracker Online Manuals
- ODBC Drivers

NOTE If you are installing Tracker on a Windows system, you must log in as the administrator of that machine for the installation to run correctly.

To install Tracker features locally without using autorun:

1 Insert the Merant Professional Series CD into the appropriate drive and exit any open applications.

2 Launch the following program:

<*Drive*>:\TRACKER\WIN32\SETUP.EXE

3 Follow the on-screen prompts to complete the installation.

a Enter the location of your license server in the Choose License Server dialog box. The license server is set up by your administrator. See Chapter 2, "Licensing Tracker with Merant License Manager," on page 21 for information on licensing. You may also choose to install a 30 day evaluation copy of Tracker. When using the evaluation copy, you may specify your license server any time during the evaluation period. See "Upgrading Your Evaluation License" on page 40 to learn how to update the license.

b On the Customer Information dialog box, you can choose to install Tracker for multiple or a single user. If you select **Anyone who uses this computer** to install it for multiple users, the install will create system DSN (Data Source Names). If you select **Only for me**, the install will create user DSNs.

c Make sure that you select the **Local** option and specify a location on a local hard drive as the destination directory in the Select Features dialog box.

Upgrading Your Tracker Projects

If you are upgrading Tracker, follow the instructions and process flow suggestions in "Creating and Managing Projects" on page 83 in the *Merant Tracker Administrator's Guide*.

Installing Merant Notify

Installing Notify

Refer to the steps in "Installing Tracker Locally" on page 45 and select the Notify feature in the Select Features dialog box to install Notify.

In the Service Logon Information dialog box (during Tracker installation), enter the username and password that Notify Service will use to log in to the system. Leave these fields blank to have the service run under the Local System account; otherwise, enter the username and password for a user account on the system.

CAUTION! If you use MAPI or Microsoft Mail, you must provide a valid username and password for the system in this dialog box.

NOTE You can change this logon information later from the Log On tab of the Properties dialog box for Tracker Notify Service (double-click the service in the Windows Service Manager).

Installing the Learning Projects

Use the MSDE with Tracker for evaluation or training purposes only

The MSDE (Microsoft SQL Server 2000 Desktop Engine) is provided for use with the Tracker Learning Projects. During the installation, the Select Features dialog box displays one of two possible choices:

- If you already have an instance of the MSDE named Tracker from a previous install, you see the option (unchecked by default) **Tracker Learning Projects (overwrite existing**

copies). This option replaces the existing Learning Project(s) but *does not* replace the MSDE.

- If you do not already have the MSDE from a previous Tracker installation, you see the option (checked by default) **Tracker Learning Projects with MSDE**. This option installs the Learning Projects along with the MSDE. After the installation, you will be required to reboot the machine.

After You Install the Learning Project

After installing the Tracker with the learning projects, you need to log in as the Tracker administrator (user name `admin` with no password). If you are using named licenses with Tracker, you need to have valid Tracker user IDs set up on the license server. You can add users to Tracker automatically if you select the **Add users when a license is requested** option on the Products tab of the Merant License Manager. See “Managing User Names for Named Licenses” on page 35.

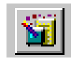
Logging in to the Learning Projects

Before logging into the learning projects, you need to ensure the license server information is correct.

You should be able to log into the Software, Asset, and Sales learning projects after installation. If, for some reason, the learning projects are not visible when you log into Tracker, you need to run through the Tracker Server Definition Wizard to set up the correct settings for the projects.

To log in:

1 Go to File | Open. The Merant Tracker Open Project dialog box appears.

2 Select Local MSDE Server from the **Look in Server** field and click the  icon.

3 Select **Edit a server definition** and click Next.

4 Select **Local MSDE Server** and click Next.

5 On this page:

- Verify that the name in the **Name** field is `Local MSDE Server`.
- In the **DBMS Type** drop-down list, select `Tracker SQL Server Sys`.
- Verify the **DBMS Location** is `(local)\Tracker`.
- Click Next.

6 Verify the DBMS User and Administrator information is correct:

- The DBMS User Information is:
  - the **User Id** is `Tracker`
  - the **Password** is `pvcstracker`
- The **DBMS Administrator Information** option is checked and the information is correct:
  - the **User Id** is `sa`
  - the **Password** is `PVCSTracker#1`
- Click Next.

7 Verify the settings and then click Finish.

8 Select the Learning Project you want to open in the Merant Tracker Open Project dialog box and click Open.

9 The default User ID for the project is `admin` with no password. Enter the User ID and click OK.

IMPORTANT! Before you begin performing any tasks with the MSDE database available for use with Tracker, note that this DBMS is provided with the product *for evaluation or training purposes only*. This system is intended to be used only as a pilot testing tool for users evaluating Tracker or learning how to use Tracker with the Learning Project.

For production data, use the other DBMSs supported by Tracker: MS SQL Server, Sybase, and Oracle.

4 Installing Tracker on a Network

In this Chapter

Process Checklist

To install Tracker on a network, perform the following steps:

☐	Ensure the license server is running [page 33]
☐	Review the network installation process [page 52]
☐	Install Tracker on a network [page 53]
☐	To include additional features in the workstation setup: Preconfigure Tracker before setting up workstations [page 55]
☐	Prepare the silent workstation setup [page 57]
☐	Set up the user workstation [page 58]

Overview

Install Tracker to a network location

A network installation allows you to install Tracker features to a location on a network file server. You can then instruct users to set up workstations to run the installed features from the network or to copy them to the local system.

This type of installation is best for environments where an Administrator centrally installs, maintains, and upgrades software. It also allows an Administrator to configure a single copy of Tracker for use by all users.

Installing Tracker on a network requires you to run the Setup program from a workstation, install the DBMS client software on each user system as applicable, and then set up the workstations for use with Tracker. Refer to "Database Requirements" on page 16 for more information.

If you want additional control over the Workstation Setup process or over Tracker functionality, you can preconfigure Tracker before users set up workstations.

NOTE The network install procedure requires you to install Tracker *from* a workstation on your network or a network file server *to* a location on a network file server.

Installing Tracker Features on a Network

Run the Setup program

Usually, you will use the autorun facility on the CD to install Tracker. In certain instances, autorun may not be available. To install Tracker to a location on a network without using autorun, run the Setup program from CD and follow the on-screen prompts.

Features installed by default

Setup installs the features required to run Tracker on a network and does not overwrite the Learning Projects if you have them already installed. If you don't have them already installed, you cannot install them to a remote location. You must install them locally.

You can choose to install features alone without installing Tracker.

NOTE If you are planning to install Tracker on a web server as well as on a network, install the web server first.

The following features are selected by default in the Select Features dialog box:

- Tracker Desktop Client
- Tracker Admin

- Tracker Workstation Setup
- TrackerLink
- Tracker TTK
- Metrics
- Tracker Online Manuals
- ODBC Drivers

NOTE Setup automatically sets up the workstation from which you are installing the Tracker features. You do not need to run the Workstation Setup program on the system from where you are installing Tracker.

To install Tracker features without using autorun:

1. Insert the Merant Professional Series CD into the appropriate drive and exit any open applications.
2. Launch the following program:

   drive:\TRACKER\WIN32\SETUP.EXE

3. Follow the on-screen prompts to install on a Network:

   a. Enter the location of your license server in the Choose License Server dialog box. The license server is set up by your administrator. See Chapter 2, "Licensing Tracker with Merant License Manager," on page 21 for information on licensing. You may also choose to install a 30 day evaluation copy of Tracker. When using the evaluation copy, you may specify your license server any time during the evaluation period. See "Upgrading Your Evaluation License" on page 40 to learn how to update the license.

   b. On the Customer Information dialog box, you can choose to install Tracker for multiple or single users. If you select **Anyone who uses this computer** to install it for multiple users, the install will create system DSN (Data Source

Names). If you select **Only for me**, the install will create user DSNs.

c Select the **Network** option and specify the location on the network as the destination directory in the Setup Type dialog box.

After you have installed Tracker to a location on the network, you must set up user workstations following the instructions in "Setting Up User Workstations" on page 58.

Optionally, you can preconfigure Tracker before users set up workstations, following the instructions in "Preconfiguring Tracker for Network Users," below.

Upgrading Your Tracker Projects

If you are upgrading Tracker, follow the instructions and process flow suggestions in "Creating and Managing Projects" on page 83 in the *Merant Tracker Administrator's Guide*.

Preconfiguring Tracker for Network Users

Tracker allows you to preconfigure the application before users set up individual workstations. This allows you to specify settings for such properties as database refresh rate, cache size, and e-mail integration. Some settings can affect product performance.

Preconfiguring Tracker requires you to edit the PVCSTRK.INI file, following the instructions in "Editing PVCSTRK.INI" on page 76. The PVCSTRK.INI file is copied to user systems during Workstation Setup. Any changes you make to this file will affect the functionality of Tracker on the user workstations.

You can also prepare a silent Workstation Setup, which allows you additional control over what features users can access from the network or copy to the local system. For information on preparing a silent Workstation Setup, see "Preparing a Silent Workstation Setup" on page 57.

Making Server Definitions Available to all Users

The Tracker Administrator can provide server definitions to all users without exposing the DBMS login information by placing the server definitions into the CONNECT.INI file. Local server definitions are stored in an encrypted format in each user's PVCSTRK.INI file. By using an editor such as Notepad, the Administrator can copy the server definitions from his PVCSTRK.INI file to the CONNECT.INI file.

The server definitions are marked in the PVCSKTRK.INI file with the following heading:

```
[Server Definitions]
```

Add the license server definitions to the CONNECT.INI file to point the workstation installs to the license server.

```
[License Server]
SERVER=@<hostname / IP>
```

After copying the server definitions section to the CONNECT.INI file, the Administrator can ensure that all users see the CONNECT.INI file, by making sure that each user's PVCSTRK.INI file contains the following entry:

```
[Tracker]
sys=v:\tracker\sys
```

where V is a drive on the network or is otherwise available to all users.

Preparing a Silent Workstation Setup

A workstation installation enables users to run a shared copy of Tracker on a network. Users can share access to the Tracker application and documentation.

After you have performed a network install of Tracker, you can prepare a silent Workstation Setup template to simplify setup for your users. A silent workstation installation allows users to set up workstations using options you predefine.

To prepare a silent setup, you need to create a response file by running the Workstation Setup program on your network from a dos prompt. Use the "/r" flag to create the SETUP.ISS template with all the installation options saved in the Windows directory. When you have completed running the Setup program, copy the SETUP.ISS file to the Workstation Setup directory on your network and instruct your users to run the Workstation Setup program.

To prepare a silent workstation install template:

1 Install Tracker to a network location, as explained in "Installing Tracker Features on a Network" on page 53 and select Workstation Setup as one of the features to install.

NOTE The location to which you install Tracker and from which the users install Tracker must be mapped to the same drive letter. For instance, if the location to which you installed Tracker is mapped to P:\merant, the users must also map to P:\merant.

---

2 Launch the following program:

```
<Tracker_Install_Dir>\TRACKER\TKNT\SETUP.EXE /r
```

3 Use the Setup program to set installation options appropriate for your users. The installation program stores

your selections in a template file called SETUP.ISS. This file is located in the Windows system directory.

4 When you have completed the Workstation Setup, copy the file SETUP.ISS to the `<`*`Tracker_Install_Dir`*`>\Tracker\TKNT` directory.

   You can change the destination directory by manually editing the SETUP.ISS file. To change the destination directory, edit the `szDir` directory in SETUP.ISS. Use the following format:

```
szDir=TargetPath
```

   Save and close the files.

Instruct users to run the setup program with the following command line option from their individual workstations:

```
<Tracker_Install_Dir>\TRACKER\TKNT\SETUP.EXE /s
```

Setting Up User Workstations

Run Workstation Setup

After you have installed Tracker on at least one location on the network, and optionally have edited the PVCSTRK.INI file to preconfigure Tracker for all your users, you can then set up the user workstations.

NOTE The Workstation Setup program requires that you have already installed the DBMS client software on the user system, if required. For more information about when DBMS client software is required, see "Installing DBMS Client Software" on page 18.

To set up a user workstation:

- Launch the setup.exe from:
  `<Tracker_Install_Dir>\Tracker\TKNT`

Optionally, you can publish to your users the location of the `\TRACKER\TKNT\SETUP.exe` program listed in step two on page 57 and have them set up their workstations themselves.

After the user workstations are set up, each user can use Tracker from the workstation to access the Tracker project database.

5 Installing Tracker on a Web Server

In this Chapter

Process Checklist

To install and set up Tracker on a web server, perform the following steps:

☐	Ensure the license server is running [page 33]
☐	Review the installation and setup process for Tracker on a web server [page 62]
☐	Install Tracker on a web server [page 63]
☐	Configure the server for Tracker users [page 66]
☐	Set up the Tracker project to use with the web client [page 68]
☐	Connect users to the web server [page 73]

Overview

The Tracker web client provides easy Internet and intranet access to Tracker issues. You can use your browser from anywhere in the world to submit new issues, query and modify existing issues, and manage your Tracker In Tray.

The Tracker web client includes a subset of the features available in the Windows interface, as well as a couple of features specific to the web interface. For more information about web client features, see the *Merant Tracker User's Guide* and "Introducing Tracker Administrator" in the *Merant Tracker Administrator's Guide*.

Installing Tracker and Web Client Features on a Web Server

A web server installation of Tracker consists of the application features, including the web client component, installed on the local drive of a web server system.

NOTE You should install the DBMS client software on the local drive of the web server system (if the client software is required) before running the Tracker Setup program. For more information about when DBMS client software is required, see “Installing DBMS Client Software” on page 18.

Setup automatically launches a configuration utility that helps you set up your web server for use with Tracker. You can also start the utility after you install Tracker to change the web server configuration, following the instructions in “Configuring a Web Server” on page 66.

Installing Tracker on a Web Server

Run the Setup program

Usually, you will use the autorun facility on the CD-ROM to install Tracker. In certain instances, autorun may not be available. To install Tracker and the web client component without using autorun, run the Setup program from CD-ROM or disk and follow the on-screen prompts.

Features installed by default

Setup installs the features required to run Tracker on a web server and does not overwrite the Learning Projects if you have them already installed. You can choose to install features alone without installing Tracker.

The following features are selected by default in the Select Features dialog box:

- Tracker Learning Projects with MSDE
(appears only if you do not already have an instance of the MSDE named Tracker from a previous install—see "Installing the Learning Projects" on page 47 for more information)
- Tracker Web Server Application
- Tracker Desktop Client
- Tracker Admin
- TrackerLink
- Tracker TTK
- Metrics
- Online Manuals
- ODBC Drivers (all are selected in the subdirectory)

NOTE Because the Tracker web client runs as a service under Windows 2000, it uses the default regional date and time format. This format is set when you install the operating system and is not customizable from within Windows 2000. Make sure that you install the web client component on a system that uses regional settings appropriate for your users. If you encounter incorrect date and time format errors in the web browser interface, re-install the component on a system configured with the appropriate regional settings. If you need to change the regional settings, contact your Merant Answerline representative.

To run the Setup program:

1. Insert the Merant Professional Series CD into the appropriate drive and exit any open applications. Setup will stop any supported web server currently running on your system.

2 Launch the following program:

<drive>`:\TRACKER\WIN32\SETUP.EXE`

3 Follow the on-screen prompts to complete installation.

  a Enter the location of your license server in the Choose License Server dialog box. The license server is set up by your administrator. See Chapter 2, "Licensing Tracker with Merant License Manager," on page 21 for information on licensing. You may also choose to install a 30 day evaluation copy of Tracker. When using the evaluation copy, you may specify your license server any time during the evaluation period. See "Upgrading Your Evaluation License" on page 40 to learn how to update the license.

  b On the Customer Information dialog box, select **Anyone who uses this computer** to install it for multiple users. The installation will create system DSN (Data Source Names).

  c Select the **Web Server** option and specify a location on a local drive as the destination directory in the Setup Type dialog box.

4 To configure your web server with the utility automatically launched by Setup, follow the instructions in the section "Configuring a Web Server," below.

Upgrading Your Tracker Projects

If you are upgrading Tracker, follow the instructions and process flow suggestions in "Creating and Managing Projects" on page 83 in the *Merant Tracker Administrator's Guide*.

Configuring a Web Server

Overview

Tracker provides a web server configuration utility that helps you set up your web server for use with the Tracker web client component.

This utility allows you to choose a web server for use with Tracker and to specify *directory name aliases*. A directory name alias, or *name translation*, is the directory name used in a URL to represent actual directory locations on the web server system. The configuration utility supplies default values which you can accept or modify.

The web server configuration utility is launched automatically when you perform a web server installation, but you can use it at any time to change the web server associated with Tracker or to change directory name aliases.

To configure a web server:

1. Either manually start the utility by selecting Merant Tracker Web Client Configuration from the Start Menu or use the utility as launched by the Setup program.
2. In the Configure a Server for Tracker Web Client dialog box, select the web server you want to configure and click Next.
3. Verify the base URL of the web server. For example, in the following URL,

   ```
   http://<server_name>:<port>/trackbin/wtms.dll
   ```

   the base URL is `http://<server_name>:<port>`

   Click Next.

4 Verify the aliases for the following directories:

Directory	Description
bin URL	Alias of the directory where the Tracker web client is located. For example, in http://<server_name>:<port>/trackbin, *trackbin* is the bin directory alias.
bin directory	Directory location of the Tracker web client installed on the hard drive of the web server system. By default, this is the Tracker\nt subdirectory of the Tracker installation directory (<install_path>\Tracker\nt).
document URL	Alias of the directory where the Tracker Web Client Help and other HTML documents are located. For example, in http://<server_name>:<port>/trackdoc, *trackdoc* is the document directory alias.
document directory	Directory location of the Tracker Web Client Help and other HTML documents. By default, this is the Tracker\InetDoc subdirectory of the Tracker installation directory (<*install_path*>\Tracker\InetDoc).
SMTP Server Name	SMTP mail server used for the notify feature in the web client. Enter the name of the SMTP server you use for e-mail.
temp file directory	Directory used to store files and notes when users submit and update issues. By default, this is the Tracker\nt subdirectory of the Tracker installation directory (<install_path>\Tracker\nt).

Click Next.

5 Follow the on-screen instructions to confirm your choices and complete the web server configuration.

6 If you are running the utility as launched by the Setup application, follow the remaining instructions in the installation wizard, and then restart your web server for installation settings to take effect.

After you have installed Tracker and the web client component and configured your web server for use with Tracker, you can set up Tracker projects for access through the Tracker web client.

Setting Up a Project for Use with the Tracker Web Client

To set up a project for use with the Tracker web client, you must configure an existing Tracker project so users can view and edit data through any supported web browser. The Update and Submit Forms that you configure using the Tracker Administrator interface in Windows are also used by Tracker web client users, allowing you to configure these forms in one place and use the same form for both Tracker for Windows and the Tracker web client. See the *Merant Tracker Administrator's Guide* for details on how to set up a form to be used by both the Tracker web client and the desktop client.

A project is ready to be set up for the web after performing the following tasks in the Tracker Administrator interface in Windows:

Step	Action
1	Create a database for the project.
2	Create the project.
3	Customize the submit and update forms, adding any custom fields you might need.
4	Assign users to the project.
5	Assign users to user groups.

Setting Up Web Options

From the Tracker web client administrator's project configuration page, you can use the Tracker Web Client Configuration Utility to configure the project to:

- Make it accessible through the Tracker web client.
- Decide whether it will be a default project.
- Indicate whether anonymous users will be allowed to log in to the project.
- Indicate whether query, submit, and update will be available through the web.

Logging In to a Project in the Tracker Web Client

Before users can access a Tracker project through the Tracker web client, you must log in to the project in the Tracker web client and configure the project for web access.

To configure the project for web access:

1. Open the Tracker Web Client Sample Page from the Start menu.
2. In the page that opens, click the Tracker Web Configuration button.
3. In the Project Database Login dialog box, select the database type you are using for Tracker. Then, specify the database location. If required for the database you chose, specify your database username and password.
4. Click Login.

NOTE The information you enter in this dialog box is the same information that you enter in the Server Configuration Wizard when you create a new server, with the exception that for web access you must enter a system DSN rather than a user DSN. The reason for this is that the web server runs as a process at the system level, not the user level.

If you are using Oracle Wire, you need to enter the following connection string in the Database Location text box:

`<host name>;SID=<SID>;PORT=<port number, default is 1521>`

---

5 In the Administrator Login dialog box, specify your User ID and password, and select the project you want to configure from the Project drop-down list. You must have Project Administrator rights to log in from this dialog box.

6 Click Login. The Merant Tracker Web Client Configure Project page appears.

Configuring the Project

To configure a project:

1 Log in to the project as described in the previous section and navigate to the Configure Project page.

2 Set Yes for **Available from the web?** This option must be set to Yes to enable this project for use with the Tracker web client.

3 Set Yes for **Is the default project?** if you want the project to be:

- Displayed and highlighted at login for anonymous users
- Highlighted in the project list in the Login dialog box for authenticated users

NOTE The Tracker web client allows only one default project. If you define this project to be the default, any project that was previously defined as such is no longer the default.

4 Set Yes for **Exclude Projects from project list** to hide project names at login. This provides a more secure login process, so that the names of projects in development can be hidden if desired. The projects are still accessible if the user knows the name of the project, but the project names do not appear.

5 Set **Enabled** to allow the web client users to:

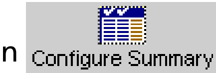
Option	To allow users to. . .
User can Change Password	Change their password for this project.
User can view In Tray	Access their In Trays for this project.
User can run queries	Run queries for this project.
User can notify users	Send notifications to other users' In Trays or e-mail inboxes.
User can Submit Issue	Submit change requests for this project.
User can Update Issue	Update change requests for this project.

Option *(cont.)*	**To allow users to. . .** *(cont.)*
Anonymous Submit	Log in to this project using an anonymous (shared) user ID. A user who is logged in as an anonymous user can submit Change Requests but cannot use other enabled features. Specify a user ID in the **Anonymous User ID field**. This user ID must be defined within Tracker Administrator for Windows. Typical values are *anonymous* and *guest*. **NOTE** The anonymous user ID is displayed in the Submitter and Owner fields of the Submit and Update pages.
Anonymous Password	If anonymous submit is enabled, specify a password for the anonymous user ID.

6 (Optional). Enable the Version Manager URL to point to where Version Manager web client is installed on your network; this adds a menu button called VM Link, which provides a shortcut from the Tracker web client to the associated Version Manager web client project.

7 (Optional). Enable the Metrics URL to point to where your reports are posted on your network. This inserts a link to the metrics results previously configured with the Metrics feature. For more information, see the *Merant Tracker User's Guide*.

8 Click Configure to configure the project with the choices you made. A page appears that confirms that the project has been successfully configured and displays your configuration choices.

9 (Optional). Click the Configure Summary icon 

to configure the Summary Results Page and control which columns are visible on the In Tray or Query Results pages.

Connecting Users

To connect users to a web-enabled Tracker project through the Tracker web client, have users access the URL of the Tracker web client component with any supported web browser. Once users have opened the URL, they can log in to any web-enabled Tracker project.

The URL of the Tracker web client is one of the following, where `baseURL` is the base URL of the web server and port number, and `binURL` is the bin URL directory you specified with the web server configuration utility:

- On an iPlanet web server:
  `http://`*`baseURL`*`/`*`binURL`*`/wt`
- On a Microsoft web server:
  `http://`*`baseURL`*`/`*`binURL`*`/wtms.dll`

You can also determine the URL of the Tracker web client by opening the sample HTML file generated by the configuration utility and clicking the Tracker web client button. To open the sample HTML file, select Tracker Web Client Sample Page from the Merant Tracker Program Group.

Updating an existing web page

If you have a web page that is already known to your users (for example, a department web page), we recommend that you create a link to the Tracker web client from that page. You have two options for connecting to a web-enabled Tracker project:

- as an authenticated user
- as an anonymous user to submit a change request on the default project

Creating a link for an existing web page

To create a link on a web page, copy one of the three connection code samples found on the sample HTML file and paste it into any web page. The connection code samples are in the three following sections on the sample HTML page:

- Log in to the Tracker web client as an authenticated user
- Anonymously submit a change request on the default project
- Anonymously submit a change request on a specific project

To open the sample HTML file, select Tracker Web Client Sample Page from the Merant Tracker Program Group.

NOTE To connect to a web-enabled Tracker project as an anonymous user, the project must be enabled to allow anonymous logins. You enable an anonymous login for a project on the Project Configuration page. The anonymous user ID you specify on this page must already be defined through the Administrator interface in Windows.

---

6 Optional Configuration Steps

In this Chapter

Editing PVCSTRK.INI

Tracker installs a file named PVCSTRK.INI in your operating system directory (by default, \WINDOWS, or \WINNT).

You can customize this file to modify Tracker configuration settings, including the frequency with which data is refreshed from the database and whether integration with Version Manager is enabled.

You can customize this file and move it to the `<Tracker_Install_Dir>\TRACKER\TKNT` directory on the network. In this scenario, the Workstation Setup program automatically copies it to each user's workstation. This enables you to customize the program for all users by editing a single file.

Changing Information Refresh

By default, Tracker refreshes information from the project database every 300 seconds (five minutes).

To turn off automatic refreshes or to change the refresh interval:

Add the `refresh_time` setting to the `[Workspace]` section. Specify the number of seconds for each interval or `0` to turn off refresh:

```
[Workspace]
refresh_time=0
```

Issue Count Refresh

The current total issue count (listed at the bottom right of the screen and displayed next to the project name in the tree view) is updated and refreshed on the Tracker screen once per minute or after each update.

To disable this refresh:

Add the following setting to the [Workspace] section:

```
[Workspace]
refresh_scr_count=off
```

Disabling Version Manager Integration

By default, Tracker loads a Version Manager .DLL to enable version control in the Tracker interface.

To prevent Tracker from loading this .DLL:

Add the pvcs_vm=off setting to the [login] section:

```
[login]
pvcs_vm=off
```

Preventing this .DLL from loading disables the Update menu options in Tracker that pertain to Version Manager integration. It also may improve startup performance.

Disabling E-mail Integration

You should only disable e-mail integration by editing PVCSTRK.INI if your e-mail system is preventing you from running Tracker. See the *Merant Tracker User's Guide* for more information on integrating Tracker with your e-mail system.

To disable e-mail integration:

Edit the [Mail] section as indicated below.

```
[Mail]
system=none
```

Disabling In Tray Notification and Sorting

If there is no INI setting in PVCSTRK.INI for the following options, *on* is the default.

In Tray Notification

To disable the feature that updates your In Tray and notifies you of incoming issues:

Enter the following:

```
[Workspace]
intray_notify=off
```

In Tray Sorting

To disable automatic In Tray sorting:

Enter the following:

```
[Workspace]
sort_intray=off
```

Setting Cache Size

Tracker sets a cache size for each of its project tables. You can change the program's performance by making adjustments to the default cache settings.

Below is a list of the Tracker tables (the table names are in **bold**) with their default cache settings. These settings do not appear in the PVCSTRK.INI file—to change the cache setting for a table, you must add the keywords as shown below, along with new settings, to the `[Cache]` section of your PVCSTRK.INI file. (If the `[Cache]` section is not already there, you will need to add it.)

To determine how to set the cache sizes, we recommend that you check the size of each table that you want to cache entering the following SQL statement with your database query tool:

```
select count(*) from tablename
```

This gives you the number of rows in the table. If the machine has enough memory to cache all the rows of a particular table, then that number will yield the best performance. The default cache settings are listed below, most of which are unlimited and do not need adjusting. The string cache sizes for the tables **trknote, trkqry**, **trkrpt**, **trkscrst, trktimst,** and **trkusr** apply to columns of the type *`text`*.

Cache performance has improved from earlier versions of Tracker. In previous versions, the cache keywords read as `*Size` (such as `ChoiceCacheSize`) allowed you to change the size of the cache table and increase the performance. For Tracker 6.6 or later, keywords read as `*Limit` (such as `ChoiceCacheLimit`) setting the cache tables to a limit, enhancing Tracker performance.

The old cache settings are ignored by the new Tracker version. If you customized your Tracker cache table settings in previous versions, compare them with the updated list of cache tables below.

NOTE Since the cache table values have increased, they may use more memory. If this interferes with your Tracker performance, you can change the unlimited values to a smaller value.

```
[Cache]

;trkassoc
AssocCacheLimit=25

;trkch
ChoiceCacheLimit=unlimited

;trkchg
ChangeCacheLimit=50

;trkfe
FolderEntryCacheLimit=100
```

```
;trkfile
FileCacheLimit=25

;trkfld
FieldCacheLimit=unlimited

;trkfme
FormEntryCacheLimit=unlimited

;trkfol
FolderCacheLimit=unlimited

;trkform
FormCacheLimit=unlimited

;trkmod
ModuleCacheLimit=unlimited

;trknote
NoteCacheLimit=25
NoteStringCacheLimit=unlimited

;trkqry
QueryCacheLimit=unlimited
QueryStringCacheLimit=unlimited

;trkrpt
ReportCacheLimit=unlimited
ReportStringCacheLimit=unlimited

;trkscrsl
SCRCacheLimit=200

;trkscrst
SCRStringCacheLimit=unlimited

;trkterm
TermCacheLimit=unlimited

;trktimsl
TimeCacheLimit=50
```

;trktimst
TimeStringCacheLimit=unlimited

;trkug
GroupCacheLimit=unlimited

;trkuge
GroupEntryCacheLimit=unlimited

;trkusr
UserCacheLimit=unlimited
UserStringCacheLimit=unlimited

Specifying a Version Manager Master Configuration File

If you specify a master configuration file for a network copy of Tracker, the setting you make will affect the functionality of Tracker for all users.

To specify a master configuration file for use with Tracker:

1 At a command prompt, change the working directory to *path*\Tracker\nt, where *path* is the location where you installed Tracker.

2 Enter the following, where *master.cfg* is the name of your master configuration file:

   trkvcfg -c*master.cfg* trkvcn.dll

NOTE This specification does not enable TrackerLink. Use this integration to assign module associations in the Tracker Submit and Update forms.

Configuring ODBC Data Sources

If you want to use installed ODBC drivers from another vendor, you can configure data sources associated with the drivers for use with Tracker. This is an optional step, as Tracker automatically installs standard DataDirect Technologies ODBC drivers and configures data source names automatically.

When you add a new data source, you must set up a *system* data source for use with the Tracker web client component. Set up a *user* data source for use with any other Tracker configuration.

To add and configure an ODBC Data Source:

1. Access your system's Data Source location: In Administrative Tools, click the Data Sources (ODBC) icon.
2. Do one of the following in the ODBC Data Source Administrator that opens:
   - On a web server system where you are running the Tracker web client, select the System DSN tab.
   - On any other system, select the User DSN tab.
3. Click Add.
4. Select the ODBC driver you want to use in the Create New Data Source dialog box that opens, then click Finish.
5. In the driver setup box that opens, enter a string in the Data Source Name field as follows, where *uniqueID* is a unique identifier for this data source:

Database	**Data Source Name**
SQL Server 7	TRK_SS_*uniqueID*
Sybase ASE	TRK_SYBASE_*uniqueID*
Oracle 8	TRK_ORACLE_*uniqueID*
Oracle Wire	TRK_ORACLE_WIRE_*uniqueID*

6 Enter a string that identifies the type of DBMS you are using in the **Description** text field; for example, Oracle9. This string appears in the Tracker and Tracker Administrator login dialog box as the DBMS Type.

7 Click OK.

NOTE Users upgrading from Tracker 6.x should use the Server Wizard to convert old server definitions. See the *Merant Tracker User's Guide*.

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7 Troubleshooting

In this Chapter

Troubleshooting a Tracker Installation

This section contains instructions for troubleshooting a Tracker installation.

Insufficient Disk Space for Setup

The Tracker Setup program requires that you have at least 4 MB of free space on the hard drive where your temporary directory is located. If you receive an insufficient disk space error during Setup, make sure that your TEMP environment variable points to a directory on a hard drive that contains at least 16MB of free space and that you can write to it.

Workstations That Share Operating System Files

Tracker stores an initialization file named ISLV.INI in your operating system directory. If workstations on your network share an operating system directory (by default, \WINDOWS or \WINNT), you must change the default location of the ISLV.INI file to a location on a local hard drive before running Setup.

To change the default location of the ISLV.INI file:

1 Set the ISLVINI environment variable in your environment to the name of a directory on a local hard drive.

2 Reboot the system, then follow the instructions for setting up a user workstation in "Setting Up User Workstations" on page 58.

Troubleshooting Database Connections

This section contains instructions for troubleshooting Microsoft SQL Server, Sybase and Oracle database connections.

Microsoft SQL Server

If you are having problems connecting to a Microsoft SQL Server database, check the following:

- Go to Start | Run and enter `cliconfg` in the **Open** field. Confirm you have an enabled protocol set up on the General tab or you have an alias setup on the server you are trying to connect to.
- Make sure the port number and user ID are correct.

Sybase

If you are having problems connecting to a Sybase database, check if you have access to the database using wisql, or SQL Advantage, utility. If you cannot access the database from the system using this utility, consult your Sybase database administrator for more information.

Oracle

If you are having problems connecting to an Oracle database, check the following:

- You have installed and configured Oracle SQL*Net client software on the local system. Your DBA or other knowledgeable user must install this software on each workstation where users access Tracker, or on the web server system that hosts the Tracker web client component.

- The PATH variable in your environment contains an entry for `path\orant\bin`, where `path` is the location of your operating system directory (by default, `\WINDOWS` or `\WINNT`).
- Configure client software using SQL*Net Easy Configuration.
- You can access the database using Oracle SQL*Plus. If you cannot access the database from the system using this utility, consult your DBA for more information on configuring the client software.
- If you are using Oracle Wire driver, confirm you are using the correct host name, Oracle SID, and port number (the default port number is 1521). Contact your Oracle database administrator for this information.

Troubleshooting Single Sign-on

If you have set up your users to use single-sign on and the users are getting prompted for their log in information every time they use Tracker, you can check if the user has a license to use Tracker and if single sign-on is enabled for the user.

Checking if Single Sign-On is Enabled

Follow the steps below to see if single sign-on is enabled. To learn more about single sign-on, refer to the *Tracker Administrator's Guide* and online Help within the Tracker Administrator tool.

To check if single sign-on is enabled:

1 In the Tracker Administrator, select a project from the Projects window.

2 Go to Manage | Configure Authentication and check Enable single sign-on.

Checking the User’s License

If the license server is running, check to see if you have not run out of licenses. If you still have enough licenses:

1 Open the Merant License Manager from Start | Programs | Merant License Manager.

2 Click the Products tab to see that the user has the license checked out.

3 Open Tracker on the user’s system and if a license is checked out after opening Tracker, the license server is working correctly.

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